INVITATION TO BID

The Board of Education of the St Clair County Regional Education Service Agency will accept sealed bids for the installation of a new library automation system. Bids will be opened on June 12, 2007 at 3:00 p.m. and read aloud at the address below. Bids received after this date and time will not be accepted or considered.

Bidders may submit questions regarding this invitation to bid to:

       Attn: Kathy Levandowski
       St. Clair County RESA
       499 Range Rd, PO Box 1500
       Marysville, MI 48040
       810.364.8990 ext 434

The Board of Education reserves the right to accept or reject any or all bids, in whole or in part, to waive any informality in the bid process and to negotiate contract terms.

The Regional Educational Service Agency is a non-profit, equal opportunity employer. Auxiliary aids and services are available to individuals with disabilities. Voice TDD (800) 649-3777.

General Information

Any questions regarding this bid request must be directed in writing to SCCRESA's Kathy Levandowski the above address or via email at quote@sccresa.org or fax at (810) 364-7474. All other communication with SCCRESA staff regarding this bid request outside the pre-bid meeting is prohibited and may result in bid disqualification. Questions will be accepted until 3 pm, June 7, 2007. Questions and answers as posted on the website will be considered part of the bid documents; bidders agree to comply with new information that may be provided on the website by the date and time specified. All bidders are responsible for ensuring that their final bid conforms to any of SCC RESA's answers to questions posted.

Bidders are required to complete and have notarized the attached Affidavit of Bidder form disclosing familial relationships with its employees and SCC RESA's superintendent and Board of Education as follows: Superintendent Dan L. DeGrow, Board: Donald B. Cole, Darryl S. Dugas, Lee A. Hulewicz, Robert F. Beattie, Jeffrey S. Beckett. Failure to complete this document may result in disqualification of bid.

Bid Award

The bid will be awarded to one or more bidders at the discretion of SCCRESA. SCCRESA reserves the right to accept or reject any and all bids, in whole or in part, to waive any irregularities in the bid process and to negotiate contract terms, in its sole discretion. The decisions of the RESA are final and bidders have no right to appeal any such decisions.

SCCRESA will to award the bid at its regularly scheduled Board meeting June 18, 2007 5:30 p.m. and to notify the successful bidder by June 19, 2007. It is SCC RESA's intent to complete this work as soon after bid award as possible, with strong preference of completing on/or before August 15, 2007. Please provide a proposed schedule of work starting with bid award and clearly indicating any dependencies on documents or signatures required by SCCRESA. Bidders shall note that work on the library automation system that will affect our ability access files must be scheduled at least one day in advance and must be performed after 4:30 pm. All measures/effort will be taken not to disrupt the work process of SCCRESA and the local school districts.

Insurance

The successful vendor will be required to provide proof of general liability, workman's compensation, bodily injury (for each vehicle) insurance in the amount of at least $1 million EACH, listing St. Clair County RESA as a co-insured, in order to be awarded the project.

Warranty

The Vendor warrants to SCCRESA that the software furnished under the contract will be of good quality, subject to manufacturer warranties and new unless otherwise required or

permitted by SCCRESA. Unless the parties agree otherwise, the Vendor extends a warranty for a period of one-year commencing on the date of the final payment made. The Vendor warrants that the work will be free from defects not inherent in the quality required or permitted. Vendors shall specify the exact periods of on-site warranty coverage for both parts and labor for all equipment and software quoted. Vendor also must state what is covered by the existing warrantee.

Potential for bonds

Depending upon the total project cost and alternates accepted by RESA, bidders may be required to supply a 100% performance, labor, and material bond on the work. The requirement of this bond is at SCCRESA's sole discretion, and vendors shall provide either a fixed dollar amount or percentage of total project cost to secure bond protection in their bid response.

Non-Discrimination and Assistance

The Board of Education of the St. Clair County RESA complies with all federal and state laws and regulations prohibiting discrimination, including the requirements of the United State Department of Education and the Michigan State Department of Education.

It is the policy of the Board that no person on the basis of race, color, religion, sex, age, national origin, ancestry, height, weight, marital status, familial status, political belief or affiliation, disability, handicap or legally protected classification shall be discriminated against, excluded from participation in, denied the benefits of, or otherwise subjected to discrimination in any program, employment practice, or activity for which it is responsible or for which it receives federal or state financial assistance.

If you would like to attend and require assistance or accommodations to participate in the bid opening or award meeting, please contact the SCC RESA's Superintendent at (810) 364-8990 at least 72 hours before the meeting.

Proposal Submission

Three (3) copies of the entire proposal must be delivered in a sealed envelope or package and clearly marked as CENTRALIZED LIBRARY, TEXTBOOK, MEDIA, and ASSET MANAGEMENT SYSTEM PROPOSAL by the date and time on the front cover. The package must be sent to Cliff DuPuy, St. Clair RESA, 499 Range Road, Marysville, MI 48040. Proposals received past the deadline will be returned, unopened. Proposals submitted by fax transmission will be rejected. Questions about the RFP should be submitted in writing or faxed to Kathy Levandowski, 499 Range Road, Marysville, MI 4804 fax 810.364.7474. All those receiving the RFP will be sent copies of the questions and responses provided from/to other vendors.

Indemnification

Contractor shall defend, indemnify, and hold harmless the owner and its constituent districts, their Board of Education, Board members, officers, employees, agents and representatives from and against any and all claims, liabilities, damages, losses, costs, and expenses (including actual attorney's fees and expenses) incurred by any of them as a result of, arising out of, or relating to the acts and/or omissions of Contractor or any employee or agent of contractor pursuant to or in connection with this agreement.

Taxes

Bidder is required to include all applicable taxes (ie-state sales tax and/or use taxeds, etc) and freight in its Bid Proposal, if applicable.

Payment Schedule

Payment for the project will be based on milestones that will be discussed with the successful bidder.

AFFIDAVIT OF BIDDER

      The undersigned, the owner or authorized office of _____
(the "Bidder"), pursuant to the familial disclosure requirement provided in the advertisement for annual computer equipment bid, hereby represent and warrant, except as provided below, that no familial relationships exist between the owner(s) or any employee of _____ and any member of the Board of Education of the School District or the Superintendent of the School District.

      <u>List any Familial Relationships:</u>

BIDDER:

_____

By: _____

Its: _____

STATE OF MICHIGAN   )
)ss.
COUNTY OF _____)

This instrument was acknowledged before me on the _ day of _____, 2005, by _____
_____.

_____
_____, Notary Public
_____ County,

Michigan

My Commission Expires: _____
Acting in the County of: _____

Request for Proposal

Centralized Library, Textbook, Media, and Asset Management System

Table of Contents

Instructions to Vendor

Introduction

It is the intent of this request for proposal to seek qualified vendors for a centralized library, textbook, media, and asset management system. The desire is to have a single vendor for the purchase of software, data conversion services, installation, training and ongoing annual technical support and maintenance of the library, textbook, media, and asset management solution.

Background

The St. Clair RESA provides library automation service to its seven local school districts. The system being requested will be installed in 60 different libraries located through St. Clair County.

Currently we are in 54 sites but will be implementing an additional 6 new elementary sites as part of this RFP.

Currently the RESA uses a Dynix system that is seven years old and plan to migrate to the new system. The RESA will provide its own hardware to support the new system. The RESA will purchase the hardware specified by the successful bidder. Each bid should contain the type of hardware and software necessary for the installation of the product. The RESA uses HP Servers for all of its network applications.

As an option we are also looking at textbook management, media management, as well as asset management. However these should all be listed as option.

We currently have one database for all 7 school districts with 500,991 record holdings, and 151,502 bibs. We would look at recommendations to maintain one database or break it up into 7 distinct databases.

Major Critical Requirements

The vendor of the centralized library, textbook, media, and asset management system under consideration should be in a position to meet the following critical requirements by the proposal due date. None of these critical elements are optional. Vendors must provide references of districts that have the implemented the proposed centralized library, textbook, media, and asset management solution meeting these requirements and have been operational for at least one full school year.
The library, textbook, media, and asset management system must meet these critical technology requirements:

- One single district library, textbook, media, and asset management application installation that supports all schools via the district wide area network (no library, textbook, media, and asset management application installations required on school-level servers or workstations, no installation of multiple applications on the district server)

- **All library, textbook, media, and asset management functionality available within a standard web browser interface** (no client software requirements outside of a web browser, no installs of Java Virtual Machine on client workstations)
- No use of Windows Terminal Services or Active X controls to deliver functionality to browser
- The system supports SQL 2005.
- Data maintained in a single SQL Server 2005 database for entire district
- Application server support for Windows 2003
- Configuration that meets district firewall, webserver and proxy server environment, including HTTPS support
- Supports Microsoft Active Directory and Novell eDirectory via LDAP (Lightweight Directory Access Protocol)
- Support for barcode scanners and handheld devices
- Support for automated interface with district student system for patron data maintenance (additions, updates, deletes and transfers)

The vendor must be prepared to give demonstrations of the following critical district and school functionality:

- Circulation (including support for off-line circulation in library, textbook, and media modules, functionality to circulate materials and process holds/reserves across the district, the ability to define independent school-level circulation policies, and support for patron data maintenance across the district)
- Searching (including advanced searches for library and textbook staff, cross-references, browsing by standard bibliographic headings, keyword searching, district-wide and school-level searching, and interfaces and functionality specifically designed to support student and teacher searching and empowerment)
- Cataloging (including support for centralized cataloging, the ability to restrict items from showing in patron searches, integrated access to K-12 MARC records, and school-level maintenance of holdings and reading program information)
- Reporting (including customizable school-level and district-level reporting, and the ability to e-mail or print the information from any function in the system)
- Inventory (including the completion of independent school-level inventory processes without disruption of normal circulation activities, and support of handheld devices to support remote inventory)
- Z39.50 client and server functionality
- Configuration and setup features (including customizable user access levels, support for overlapping barcode ranges across the district for patrons and copies for library and textbook modules, and support for varying barcode format/lengths and symbologies within each school)

The implementation project provided must include the following critical services:

- Data conversion from current library, textbook, media, and asset automation solution
- Installation of centralized library, textbook, media, and asset management system software, data loading and application configuration

- Project management services to coordinate with district staff
- Staff functional and technical training
- Ongoing technical support and maintenance

Scope of the Project

Proposals are sought for a complete implementation solution including software, data conversion, installation, training, and ongoing technical support and maintenance. While quotations are sought for a complete solution, this RFP differentiates between those to be part of the base bid and those to be offered as options.

Metasearching - Support for metasearching (or broadcast searching) across several paid or free subscription databases and the library and textbook collection

Cataloged websites - Searching and access to pre-cataloged K-12 approved websites

Enhanced content - Access to enhanced content such as book covers and reviews within the searching functions

Reading program data enhancement - Subscription access to integrated web-based data services to maintain reading program data in the library and textbook collection]

Audio-visual MARC records – Subscription online access to MARC records for K-12 audio-visual materials.

State and provincial standards searching – Subscription access to curriculum standards and searching for websites and titles that support those standards.

Integration of all software modules purchased from the vendor.

Web-based training in addition to other training options should be available.

Proposal Submission

Three (3) copies of the entire proposal must be delivered in a sealed envelope or package and clearly marked as CENTRALIZED LIBRARY, TEXTBOOK, MEDIA, and ASSET MANAGEMENT SYSTEM PROPOSAL by the date and time on the front cover. The package must be sent to Cliff DuPuy, St. Clair RESA, 499 Range Road, Marysville, MI 48040. Proposals received past the deadline will be returned, unopened. Proposals submitted by fax transmission will be rejected. Questions about the RFP should be submitted in writing or faxed to Kathy Levandowski, 499 Range Road, Marysville, MI 4804 fax 810.364.7474. All those receiving the RFP will be sent copies of the questions and responses provided from/to other vendors.

Additional Information

The district reserves the right to request any additional information, which might be deemed necessary after reviewing this document.

Withdrawal of Proposals

Proposals may be withdrawn upon written or faxed request received from vendors prior to the stated date and time of the proposals opening. Negligence, error, or oversight confers no right for withdrawal of the proposal after the time fixed for proposal opening.

Non-discrimination

The district requires that all of its contractors abide by non-discriminatory practices in hiring, recruitment, placement, selection for training, promotion, and compensation.

Contractors and their subcontractors must insure that applicants and employees are not discriminated against on the basis of race, color, religion, ancestry, national origin, age, handicap, or sex.

Guarantees and Warranties

All guarantees and warranties should be stated in writing and submitted as part of the proposal.

The vendor shall warrant that the system will meet the reliability and performance requirements set forth in the RFP and will continue to do so as long as the system remains under vendor maintenance.

Award of Contract

The district shall have a period of 60 calendar days after opening of the proposals in which to award the contract. Prices will remain valid for this time.

Evaluation and Selection Criteria

- Adherence of the proposal to the response format
- Adherence of the proposal in meeting the technology, functional and implementation services requirements outlined in the document
- Feedback from references
- Company's overall experience
- Company's stability and commitment

Cost of Proposal Preparation

All costs of preparing the proposal are to be borne by the respondent and may not be included in the proposal price.

Response to Specifications

Vendors must respond to every functional, technical, and general implementation requirement contained in the Specifications section of the RFP using the following criteria. Vendor's responses must be in the same order in which points appear in this RFP.

Y   YES. Feature, function, product, or service is available as requested and is fully operational using the version proposed at one or more districts.

D   IN DEVELOPMENT. Feature, function, product, or service is under active development and operating in a test environment.

P   PLANNED. Feature, function, product, or service is planned. No development has begun.

N   NO. Feature, function, product, or service is not available, in development or planned.

For any specifications to which the vendor answers other than YES, vendor must describe:

a) The feature, function, product, or service being planned or developed, indicating the date after which the function and feature will be available in general release and operation in the system proposed.

b) Whether the district will incur any added cost for the feature, function, product, or service once it becomes available, either as a direct cost of the feature, function, product, or service, or because the feature, function, product, or service will require replacement of or addition to hardware or software originally proposed for initial installation.

c) If the feature, function, product, or service is not available, in development or planned, an explanation of how the specification might otherwise be met using alternative features, functions, products, or services available from the vendor, including availability dates for any such alternative and any added costs, either direct or indirect.

Any such exception taken to any specification **must** be stated immediately following the specification in question. Vendors are advised that the district is interested in receiving proposals from vendors who can offer a centralized library, textbook, media, and asset management system already in use by an installed customer base, and that proposals for systems in an Alpha or Beta phase of development will not be considered. The district reserves the right to evaluate all proposals solely on the basis of currently existing features, functions, products, or services meeting the specifications as stated.

Solution Specifications

General Implementation Requirements

_____The vendor must quote and be able to provide all of the following products and services, to the full extent required for successful system implementation and operation:

    _____Application software

    _____Data conversion and enhancement (including conversion of outstanding transactions and statistics from current Follett Circulation Plus/Catalog Plus systems)

    _____Installation, application configuration and database loading

    _____Ongoing technical support and software maintenance

    _____Project management services to support district staff in implementation

    _____Staff functional and technical training

    _____Documentation/Online Help

    _____Barcode scanners and handheld devices for remote functions

_____The system includes one year of technical support and software maintenance provided without added cost.

_____Access to technical support and maintenance of the software is available from the vendor on an annually renewable contract basis.

_____The vendor must agree to accept requests for technical support via:

    _____Toll-free phone number

    _____ FAX

    _____Electronic mail (Internet)

    _____24-hour voice mail service

_____ The vendor logs all problems and requests reported by the district for tracking and escalation procedures.

_____Technical support is available Monday through Friday during normal business hours. 24/7 emergency support can be obtained for an additional cost.

_____ Software maintenance is available by special request for times outside normal business hours including weekends and company holidays.

_____The district will have access to a vendor sponsored electronic discussion group and customer care website.

_____User groups are available.

_____The vendor provides instructors and all necessary instructional materials that may be required for effective instruction and training.

_____ The vendor will train personnel to provide first-level support on a day-to-day basis, with expected competencies including abilities to:

_____Use each functional component

_____Train other staff members in daily operation and use of their systems

_____Handle emergencies that might arise before district support staff can assist or vendor support staff can be contacted

_____Troubleshoot and solve simple problems in lieu of calling district staff or the vendor's technical support staff.

_____ The vendor will train district technical staff to manage and operate the system on a day-to-day basis, with expected competencies including abilities to:

_____Start up and shutdown the system

_____Monitor and operate the system on a day-to-day basis

_____Handle emergencies with the system that might arise before the vendor support staff can be contacted

_____Troubleshoot and solve simple problems with the system in lieu of calling vendor support staff

_____Load software enhancements received from the vendor

_____Process student information obtained from the district's student information system

_____Run system and data backup operations

_____Use the supplied system maintenance utilities

_____Perform recommended preventive maintenance and security measures

_____ The vendor offers refresher-training opportunities both on-line and on-site.

_____ The vendor offers a variety of workshops.

Technology Requirements

_____ The system consists of a single centralized district library, textbook, media, and asset management application that is installed at one location for the district. All or some of the modules may be purchased.

_____The system is fully integrated, using a single, common database and application for all features and a common user interface across all functions.

_____ All functionality of the system (all circulation, cataloging, reporting, searching, and inventory functions) can be accessed at any workstation on the district's wide

area network with a standard browser (Internet Explorer, Netscape Navigator, Mozilla Firefox, Apple Safari).

_____ The district can make any portion of the library, textbook, media, and asset management functionality available via the Internet for home and/or community access.

_____ The system does not require any library, textbook, media, and asset management client applications to be installed on the workstation.

_____The system supports web browsers.

_____ The system does not require use of Terminal Services on either the workstations or servers to support the delivery of any application functionality to the browser.

_____ System data is stored within SQL Server 2005.

_____ Application servers can run on Windows Server 2003.

_____ The system does not require ActiveX controls or installation of Java Virtual Machine on the workstations.

_____ The system can function within a Microsoft IIS or Apache Web Server environment.

_____ The system does not require use of Microsoft IIS or Apache Web Server.

_____ The system can supports integration with Microsoft Active Directory and Novell eDirectory for LDAP.

_____ The system can work in a proxy server environment.

_____ The system includes support for an automated interface with the district's student information system (SIS).

_____ The automated interface with the district's student information system (SIS) supports adding new patrons, deleting existing patrons, updating existing patrons, and transferring patrons from one school in the district to another. When a student is transferred, all outstanding circulation transactions and statistics history are maintained with the patron.

_____ The automated interface with the district's student information system (SIS) can support matching on either the patron's library and textbook barcode or some other district-defined patron identifier field.

_____ The system requires no additional hardware or software purchases beyond the hardware/software system requirements outlined by the vendor.

_____ The system requires no local application programming in order to become operational.

_____ The system includes support for barcode scanners and handheld devices for use with remote/off-line functions.

_____The system allows printing of information displayed in the interface from any function within the system (without requiring copy/paste operations).

_____The system provides for reports in a PDF format.

_____ The system allows automatically scheduled checkout/overdue materials and unpaid fine notices reports.

_____The system provides for HTTPS support in all functions where usernames and/or passwords are transmitted.

General Functional Requirements

_____The following functionality is operational and in current use at multiple existing customer districts:

    _____School-level circulation and circulation across the district

    _____Off-line circulation with handheld device or scanner for library and textbook modules

    _____Inventory

    _____Remote inventory with handheld device or scanner

    _____Centralized cataloging of bibliographic data, authority data and holdings data

    _____Integrated access to K-12 MARC record database

    _____School-level and district level cataloging of textbooks, media, and assets, bibliographic data, holdings data and reading program information

    _____School-level and district-level reporting

    _____Staff searching functions including LCCN/ISBN/ISSN, call number, control number and barcode searches for library materials

    _____Searching for hyphenated words or names can be done with or without using the hyphen.

    _____Student and teacher searching functions including cross-references, keyword searching, reading program and Lexile searching, material type and publication date limiters, lower-grade level interface and browsing of standard bibliographic headings

    _____Student and teacher patron empowerment functions (including review of current outstanding transactions, maintenance of personal booklist, generation of bibliographies, renew, submit hold/reserve requests)

    _____ Z39.50 Client and Server

    _____ Customizable user access levels, user logins and passwords

_____ Support for holdings and patron barcodes with overlapping ranges across the district for the library and textbook modules, and varying formats/lengths and symbologies within each school

_____ Support for international currencies, date formats, province, country, and Turkish diacritics are available.

_____The system provides an online "help" function that users can access without losing their place in the feature being used.

_____Pop-up help windows must contain a menu bar that allows staff to print help topics.

_____The interface can be customized with the district's logo or individual school logos at each school.

_____The interface can be customized at the school-level to include additional information regarding the media center, and links to customer-defined resources, and other customer-defined webpages/websites.

_____The system allows for defining access levels that control the functions available to each user when they login.

_____The system allows staff to modify user passwords from a central location.

_____The system must allow batch updating of patrons by uploading a file of patron barcodes and allow up to three patron fields to be changed at a time.

_____The system must allow automatic assignment of a patron barcode when a student is transferred and no district-wide student barcoding system is used.

_____The system must be able to match on ISBN and LCCN when displaying reading program information.

_____The system must allow the system administrator to post a message to all users.

_____The system must allow the administrator to configure the hours and days as well as the tasks they want to limit to prevent lengthy tasks from running during certain timeframes.

_____The system must display the last backup date.

Library Management

Circulation Requirements

_____Access to circulation functions and records are restricted to authorized persons.

_____ The system provides for scanning of barcode labels affixed to patron cards and library and textbook materials.

_____Circulation transactions are updated online in real time.

_____The system allows capture of circulation transactions offline and loading of these transactions when the system is available.

_____ The system supports capture of off-line or remote circulation transactions using a scanner or portable handheld device.

_____ The system allows for easy movement between circulation functions based on hotkeys and barcode command sheets.

_____ The system allows for the user to reset the display of circulation functions and clear patron information to protect patron privacy.

_____ The system allows for editing of patron information from directly within the circulation functions.

_____The system provides access to patron records by barcode number, any portion of the patron's name (first, last, middle and nickname), grade level, homeroom and other user-defined patron fields, in the circulation functions.

_____The system provides access to title/copy records in circulation function by barcode, or title keywords in the circulation functions.

_____The system permits staff to allow check out of items to patrons from other schools in the district, if desired, to support interlibrary loan within the district.

_____The system will be able to process the following types of checkout and check-in transactions:

     _____Regular checkout for patron with item in hand
     _____Renewal checkout for patron with item in hand (renewal by patron)
     _____Renewals without prior knowledge of which patrons have the items currently checked out (renew by copy barcode)
     _____Recording of materials used in library prior to re-shelving (in-library usage)
     _____Regular checkin

_____The system provides staff with notification of automatic blocks in circulation for conditions including:

     _____Patron has requested hold of materials that are ready
     _____Patron has overdue materials
     _____Patron has outstanding fines
     _____Patron has expired card
     _____Renewal limit reached for item
     _____Holds limit reached
     _____Checkout limit reached
     _____Inactive or restricted patron
     _____Patron attends another school

_____The system permits staff to easily view if the patron is in violation of any configured library policies, the patron's outstanding transactions, the patron's school and personal demographic information, and a picture of the patron.

_____The system lists each outstanding checkout for the patron in the checkout function when the patron record is accessed.

_____The system allows the user to renew all items for a given patron in one step.

_____The system can allow the staff to set up policies with a loan period of 1-23 hours.

_____The system can allow the staff to set up policies with fixed due dates.

_____The system can allow the staff to see the loan periods for all patron type or circulation type combinations.

_____The staff has the option to print receipts to a standard printer and to a 40-column printer.

_____The staff has the ability to see historical circulation statistics based on years, months, days and hours

_____The system allows each school to configure the display of the locally defined patron fields in the circulation functions, if desired.

_____The system can allow the staff to define patron notes that are automatically displayed in the circulation functions when the patron is identified for a transaction.

_____The system can allow the staff to define copy notes that are automatically displayed in the circulation functions when the copy is identified for a transaction.

_____Patrons are able to checkout materials on their first visit.

_____The system has the capability of limiting patrons to use of specific types of materials.

_____Renewal of an item is blocked if the patron is delinquent, title has a hold registered against it, renewal limit has been reached, or item is restricted in some other way.

_____Circulation features provide audible and visual signals to indicate:
  _____Acceptance of the patron card
  _____Acceptance of the item identification number
  _____Any condition that must be reviewed for the transaction to complete

_____Only one entry of patron identification will be required per batch of items to be checked out to that patron at that time.

_____The system may be set up to allow limited access to the circulation features, so aids or student helpers can circulate items.

_____The system allows for all loan policies and circulation parameters/configuration to be defined on a school-by-school basis.

_____The system will accommodate a ceiling due date to signal all checkout transactions are due by a specified date at the end of the school year.

_____The system will accommodate an unlimited number of patron types/categories and material types/categories for defining loan policies.

_____It is possible for the system to determine loan periods from the material and patron category.

_____It is possible for authorized staff to override loan periods and specify special due dates.

_____The ability to override blocks can be username/password controlled.

_____The system has the ability to limit the number of items on loan to a patron by patron category, with capability of override.

_____Variations in amount of fines assessed daily, grace periods, and maximum fine amount for overdues, for various materials and patron types, are accommodated.

_____The system can automatically assess overdue fines for materials that are checked in after their due date.

_____The system allows each school to maintain a calendar that identifies closed days.

_____The system alerts the user that an item not previously checked-in is being checked-out or checked-in.

_____The system alerts the user that an item previously marked as lost is being checked-out.

_____The system is capable of accommodating the circulation of a variety of material types including serials, pamphlets, documents, maps, microforms, kits, and audio-visual materials.

_____The system accommodates the circulation of partially cataloged or uncataloged materials (checkout of temporary items).

_____The system permits staff to easily determine the current circulation status of any item (whether any particular title is currently in circulation and when it is, or was, due back, if the item is marked as lost) from directly within the circulation functions.

_____The system will allow the staff to specify a timeframe after which the status of an overdue book will be changed to a lost status.

_____The item record contains current patron and due date (if checked out), the last patron and due date, and circulation statistics.

_____The system permits staff to mark an item as lost – independent of whether or not the item is currently checked out, and independent of any inventory process.

_____The system permits staff to automatically charge a patron for a lost item based on the copy price or a user-defined fine amount.

_____Capability of accepting full or partial payment of fines against any specified items is provided.

_____The system allows the placement of holds on any copy of a title or on a specific copy, with ability to modify the priority of the hold queue.

_____The system allow staff to review a list of items being held for patrons, for whom they are being held and the expiration date for the hold.

_____The system allows staff to review a list of outstanding hold requests where items are not yet available to fulfill the hold request.

_____The system allows staff to review a list of outstanding hold requests where items are available to fulfill the hold request, and indicate that the material has been placed on the hold shelf.

_____The system allows holds/reserves to be placed for materials from other schools, if desired, to support interlibrary loans within the district.

_____The system allows automated routing of materials and the ability to view request status of interlibrary loans within the district.

_____Hold requests submitted by patrons for materials in another library can be reviewed and approved by the library media specialist of the patron before the hold request is provided to the library that has the material requested.

_____The system allows the authorized user to select a school to fulfill a hold request for materials available off-site.

_____The system has the ability to place a hold on a title or to place a hold on any specific item in any library within the district.

_____The system has the ability to define the following hold parameters by patron type: default hold priority, number of days before a ready hold is expired, and number of days before an expired hold is deleted.

_____The system is able to place a hold on the first copy that becomes available within the library.

_____The system will cancel holds automatically based on a configurable number of days after the material becomes available and will delete the holds based on a configurable number of days after the expiration date.

_____The system will automatically alert the user each day regarding hold requests that need to reviewed or acted upon.

_____The system is able to accept partial payments for fines.

_____The system allows the user to print a receipt when a fine is paid.

_____The system is capable of allowing authorized staff to waive or pay fines.

_____The system provides reporting on patrons' fine history including how much was assessed, paid, and waived even if the titles or copies no are no longer in the system.

_____The system allows the user to create fines for various user-defined reasons (such as copier fee) where the fine is not associated with a specific title/copy.

_____The system supports retention of historical records on title use, and also limits display of individual patron use information to protect the privacy of patrons.

_____ The system will allow a reserve or hold to be placed for a specific copy for a future date.

_____The system will retain fines and history after deleting copy information.

_____The system will retain fines and history after deleting patron information.

_____Patron files shall accommodate:

    _____Patron barcode
    _____Patron school
    _____Patron name
    _____Patron addresses and telephone numbers (2)
    _____Patron email addresses (2)
    _____Date of birth
    _____Gender
    _____Patron picture
    _____Patron status (Active, Inactive, Restricted)
    _____Patron access level (rights to functionality)
    _____Indication of Patron's Acceptable Use Policy on file
    _____Patron's homeroom
    _____Patron's nickname
    _____Patron's grade level
    _____Patron username and password (for access to patron empowerment)
    _____Patron Type (for loan policies)
    _____Fines Owed
    _____Materials Outstanding
    _____Pending and Ready Hold Requests
    _____Pending and Ready Reserve Requests
    _____Card Expiration Date
    _____Graduation Date
    _____Patron usage statistics
    _____5 Locally Defined Patron Fields
    _____Unlimited Locally Defined Notes

_____It is possible to import patron records using standard comma-delimited files at the individual school level.

_____The patron import function reports errors and warnings and allows direct access to the editing function for records with warnings.

_____It is possible to import patron picture files.

_____It is possible to produce a list of patrons sorted by user-defined patron fields (for example, Language Arts Teacher).

_____The system is able to purge an entire group of patrons, but should retain for later deletion individual patron records with outstanding obligations against them.

Inventory Requirements

_____The system is capable of supporting an inventory of the library without impacting the ability to circulate items.

_____The system can process barcode scans for inventory by the following methods: scanning directly into the inventory interface, from a text file containing a list of barcodes, or from a hand-held device used to scan barcodes remotely at the shelves.

_____The system can automatically identify items in circulation (existing checkouts) as accounted for during an inventory.

_____The system can automatically checkin items (existing checkouts), using normal checkin processing, when they are scanned during an inventory.

_____The system can produce a listing of all items not accounted for during the inventory.

_____The system can produce a listing of all items marked as lost during the inventory.

_____The user can review the displayed list of unaccounted for items and can indicate, directly in the system from the list, that the item has been found, or the item should be marked as lost.

_____The user can review the displayed list of items marked as lost and can indicate, directly in the system from the list, that the item has been found (can be accounted for), or the item should be deleted.

_____The system can allow parameters set up for the shelf checking and can check order based on:

_____Call Number
_____Call number/Author
_____Call Number/Author/Title

_____The staff can choose to be alerted if Dewey differences are greater than:

_____100
_____50

_____10
_____1

_____The system must have the ability to delete all the copies marked "lost" on or before date field.

_____The system must allow the staff to count only part of the collection based on a call number range.

Searching Requirements

_____The system allows the staff to configure searching options and patron empowerment functions available to different groups of patrons or staff.

_____The system allows the staff at each school to configure a home page that contains information regarding the media center as well as links to other resources available to the students.

_____The system allows the students to perform searches in the library, and maintain a list of items of interest, without having to login to the application.

_____The system allows search results to be sorted by relevance.

_____The system will save sorting preference for users who log into the system.

_____ The system will reset an inactive search station after the specified number of minutes.

_____There is a system-contained stop list of words that automatically excluded from searches to minimize the number of unnecessary hits for patrons.

_____The system allows the staff to identify items that will not be displayed in patron searches.

_____The system provides keyword searches for materials by the following search strategies: title, author, subject, series, and all keyworded tags.

_____The system allows users to browse materials by the following MARC headings: title, author, subject, and series.

_____The display of bibliographic headings in browse functions will contain SEE and SEE ALSO references to guide patrons to other materials.

_____The display of bibliographic headings in browse functions will identify the number of titles with each heading.

_____The system provides for search of materials by LCCN, ISBN, ISSN, control number, call number, barcode number and user-defined copy-level categories.

_____ The system supports reading program searches where the search can be narrowed by reading level, point value, title, subject and author. Reading program point values and reading levels are included in search results and can be sorted.

_____Reading program searches support the following reading programs: Accelerated Reader and Reading Counts.

_____Reading program searches are based on test information for each specific school.

_____The system supports Lexile searches where the search can be narrowed by Lexile measure and/or code (i.e. BR, AD, etc.). Lexile measures are included in search results and can be sorted.

_____Keyword searches support internal or imbedded truncation (wildcards), e.g., one entry can retrieve 'woman' and 'women', or 'organization' and 'organisation' and phrase searching.

_____The system enables a user to enter multiple words or phrases to be searched in one, more than one, or all fields.

_____The system allows the user to limit searches based on material type and/or publication date (before, after or during a specific year).

_____The system accommodates Boolean searches using terms in AND, OR, and NOT relationships.

_____The system allows the patron to search for items within their school library, across all schools in the district, or in selected groups of libraries defined by staff.

_____ The system is able to search on the MARC 856 tags which will link to pre-approved Internet web sites and other applications.

_____Variations in punctuation, capitalization, use of diacritics, and spacing does not impede searching.

_____The system will list the number of hits retrieved from a search request and will provide navigation controls to move between the hits.

_____The system allows the user to display a list of search results associated with a selected heading from the browse functions.

_____The list of search results will identify the search term used to produce the list.

_____The system allows the patron to sort the search results by relevance, title, author, call number, publication year, material type, and status.

_____The list of search results will contain the following information for each title: title, author, call number, publication date, material type and number of copies owned and available.

_____The list of search results for searches including materials outside of the patron's library will identify titles that are available off-site, and the number of copies available off-site.

_____The system displays bibliographic records in a labeled format that is easily understood by patrons.

_____The system can display reading level, interest level, point value and quiz number in the bibliographic record display for reading program titles.

_____The system can display bibliographic records from search functions in a MARC format for staff use.

_____The system displays the following holding information for each bibliographic record in the search functions: call number, barcode, circulation status, description and sublocation.

_____The system displays the following holding information for each bibliographic record in the search functions for titles held by other libraries: call number, barcode, circulation status, description and sublocation.

_____The system allows the user to search for other items by the same authors, subjects, series directly from within the bibliographic record display.

_____The system allows the user to search for other items with SEE ALSO cross-references for authors, subjects and series directly from within the bibliographic record display.

_____ It is possible to print any information from the searching interface including individual titles, the search results or the user-maintained list of items of interest.

_____ Students are able to print the entire sets of hits resulting from a keyword search.

_____The system allows the patron to build and edit a list of items of interest and produce a bibliography that can be printed or saved to a file.

_____The system allows bibliographies with or without annotations to be printed by the patron.

_____The system allows ebooks to be searched and displayed.

_____The system provides patron empowerment functions to permit authorized patrons to view and print their own checkouts, fines and holds information, to renew their own items, and to place holds and reserves on any materials within the district.

_____The system allows staff to set a limit on the number of holds a patron may place.

_____The system has an icon-based search function with sets of icons and searches of interest to K-12 patrons and these searches will not require the purchase of additional of additional software.

_____Library staff may define custom icons and searches for the icon-based search functions.

_____Library staff may design custom pre-set searches to retrieve the best results for standard topics such as science projects, crafts, or specific holidays.

_____The system must have the ability to search for brief records by a call number range.

_____The system allows users to search both media and library collections at the same time in an integrated search with one hit list returned.

Cataloging Requirements

_____All schools in the district share a system-wide bibliographic file.

_____The system can support a central cataloging model where district catalogers can maintain title and holdings information for each school from a single login.

_____The system allows the cataloging of library materials at the district level without assigning a barcode, adding a copy, or assigning it to a site.

_____The system can support spine label printing for items cataloged at the district level without assigned barcodes.

_____The system can support a school-level cataloging model where each school has rights to maintain title and holdings information.

_____The system can allow site staff to assign site-specific subject headings to a title record that only that site can search in order to support local learning initiatives.

_____ The system allows the cataloging user to locate MARC records by searching a vendor-supplied database over 6 million K-12 records from directly within cataloging functions.

_____When performing a recon against a vendor-supplied database of MARC records, the user must be able to view records that were not updated.

_____When performing a recon against a vendor-supplied database of MARC records, the user must be able to choose to recon only brief library records or all library records.

_____The system must be able to do a recon on a selected number of records in the database.

_____When editing a MARC record, the user must be able to add, edit and delete tags and subfields.

_____The vendor-supplied MARC database can be searched with the following search strategies: title, author, ISBN (with 10 and 13 digits), ISSN and LCCN.

_____The system includes initial access to the vendor-supplied MARC database at no additional cost and access in subsequent years as part of the normal ongoing support costs.

_____The software vendor maintains the vendor-supplied MARC database and new records are added on at least a monthly basis.

_____ The system allows the cataloging user to locate MARC records added by other schools, or available from the vendor-supplied database, automatically as part of adding a title to facilitate keeping the number of duplicate records in the system at a minimum.

_____ The system allows the cataloging user to duplicate existing records as a template for adding similar titles.

_____ The system allows the cataloging user to add a record from the vendor-supplied database directly into the district's collection without use of any separate export or import functions.

_____The system allows the import of MARC bibliographic records at the district level and at the individual school level.

_____The system allows the export of MARC bibliographic records at the district level and at the individual school level.

_____The system allows the import of MARC authority records at the district level.

_____The MARC bibliographic import function has matching logic based on title, author, material type, ISBN/LCCN/ISSN and publication date, and copy barcode, to minimize duplicate records in the system.

_____The MARC bibliographic import function has additional "relaxed" matching logic based on title, author, material type, and publication date to reduce the number of duplicate records in the system.

_____The MARC bibliographic import function at the district level allows the import of holdings information for multiple schools in a single MARC file.

_____The MARC bibliographic import function allows the user to choose to replace or skip matching records.

_____The MARC import functions reports errors and warnings and allows direct access to the editing function for records with warnings.

_____The MARC bibliographic import function has logic to ensure that existing records will not be replaced by matching records which have an inferior quality (fewer access points and MARC content).

_____The system provides for MARC templates containing required and recommended tags/subfields for several different types of material.

_____The system supports entry and maintenance of cataloging information via a full MARC editor with support for adding, editing and deleting individual tags and subfields.

_____The system provides for detailed online help on most MARC tags and subfields including examples.

_____The system supports entry and maintenance of cataloging information via an easy editor with forms and prompts that do not require detailed knowledge of MARC tags and subfields.

_____The easy editor allows the user to catalog the following information: title, LCCN, ISBN, ISSN, material type, author, publication information, physical description information, series, interest level, notes, subjects, electronic resources, reading program quiz information, alternate titles, co-authors, illustrators, editors, etc.

_____The system allows the cataloger to maintain individual holdings records that capture information for each specific item/copy in the collection.

_____The copy/item information that can be maintained includes: call number, acquisition date, barcode, copy price, circulation type, user-defined copy categories, copy notes, up to 3 description/enumeration fields, copy number, sublocation, vendor and funding source.

_____The system will allow scanning of the ISBN barcode of an item to speed database searches and increase accuracy while cataloging.

_____The system supports the ability to remove subject headings by type (LC, Sears, etc.) as records are added to the system.

_____The system supports the ability to globally remove subject headings by type (LC, Sears, etc.) from the system.

_____The system enables a bibliographic record or holdings/item record to be retrieved and modified at any time, once it has been entered.

_____The system enables a partial record to be entered if complete information is not yet available.

_____The system allows designated materials to not display in patron searches.

_____The system allows item/copy records to be duplicated to allow for easy adding of new copies.

_____The system accommodates:

        _____ Personal, corporate and meeting name headings in a name authority file

        _____ Title, uniform title, and series entries in a title authority file

        _____ Topical and geographical subject headings in a subject authority file

_____The system records the source of each authorized heading or entry.

_____The system is able to match LC or other national standard authority records against the local file.

_____The system stores authority records in conformance with the MARC formats for authority records.

_____The system automatically links each authorized heading to each occurrence of the heading in the bibliographic database.

_____System's authority function generates SEE and SEE ALSO references from authority records to direct searchers to other headings as follows:

        _____See references   (aeroplanes to airplanes)
        _____Narrower terms   (automobiles to sports cars)
        _____Broader terms   (automobiles to motor vehicles)
        _____Related terms   (airplanes to flying machines)

_____The system enables an authorized user to browse through the list of terms maintained for authority control.

_____The system provides an easy editor that that will enable library staff to make local modifications to imported authority records, and to create local authority records, without detailed knowledge the MARC authority format.

_____The system enables an authorized operator to maintain authority lists by adding new terms, removing terms or modifying existing terms.

_____The system imposes no limit on the number of SEE and SEE ALSO headings that may be added to an authority record.

_____The system automatically creates see- and see-also references from the authority record, and must automatically link these references to matching headings in the searching interface.

_____Library staff may define and assign copy-level categories (user-defined copy fields) to organize items in standard topics such as science projects, crafts, or specific holidays.

_____Library staff may assign copy-level categories by scanning items individually, or by assigning the category to groups of items from a selected list, from barcodes scanned into a text file or the handheld device.

_____Library staff may automatically remove titles with no copies from the collection, and limit the process to preserve catalog records for electronic resources, eBooks, and titles still in processing (added within a specified number of days).

_____The system must allow for the library staff to have the ability to search by call number.

_____Library staff must be allowed to configure the basic search options that are available and the order in which they will appear.

_____When doing a keyword search, the keywords should be highlighted when found through the basic search.

_____The system should display state and provincial standard examples.

_____The library staff must have the ability to show full or brief information on title details.

_____The system must recognize the primary English, French, and Spanish/Portuguese leading articles:

     _____English: a, an, d', de, the, ye
     _____French: l', la, le, un, les, une
     _____Spanish/Portuguese: el, la, las, lo, los, o, os, um, uma, un, una

_____The system must have the ability to acknowledge or ignore leading articles in title search terms.

_____The system must have the ability to find titles with duplicate standard numbers and titles without standard numbers.

_____When removing titles without copies, the system must be able to preview the titles before they are deleted.

_____When importing copies, the system must be able to assign the next available barcode number to a copy.

_____Upon import, circulation type, categories, sublocation, vendor and funding source must be able to be assigned.

_____When exporting library titles, users have the ability to delete titles/copies after export. Copies that are currently checked out will not be deleted.

_____Upon exporting library bibliographic records, users can include all records, full records only or brief records only. Plus have the option of copy information to appear or not to appear in the export file.

_____Users must have the ability to preview the effects of an import on their collection before performing the actual import of a record.

_____The system must have the ability to add a title without having to perform a search for the title first.

_____When enhancing a tag in the MARC record, the system allows users to type in the tag number or use a scroll bar to choose the desired tag.

_____Users must be able to update subject, author and series headings globally.

_____Users must have the ability to globally delete tags (including 526, 856, or 9xx). Plus have the ability to remove all tags or only those that have data that matches specific subfield information.

_____Users have the ability to globally update a copies category, call number prefix, circulation type, description, funding source, sub location and vendor.

_____Users have the ability to delete every copy scanned.

_____Users can update/assign a particular circulation type, category, sublocation or copy status to every copy scanned.

_____Users must be able to see copy status from cataloging, as well as from circulation.

Reporting Requirements

This section outlines reporting requirements that are in addition to those printing and list requirements outlined in other functional sections. Note that the application must allow printing of information displayed in the interface from any function within the system (without copy/paste operations). Many lists displayed within the searching, cataloging and circulation functions must be printed to serve reporting needs. The additional reporting outlined in this section is used primarily to support collection development and maintenance, to monitor and promote library usage and to communicate with users regarding outstanding transactions.

_____The system provides district wide reporting and school-level reporting.

_____The system has the ability to display and print for a given patron the current outstanding transactions (checkouts, fines, holds).

_____The system supplies fines reports indicating all outstanding fines with the following information: the date the fine was created, and the type of fine assessed, fine amount, the patron name and the first two user-defined patron fields, the title, barcode and call number of any associated material.

_____The system supplies checkout and overdues reports indicating all outstanding checkouts and/or overdues with the following information: the due date, an estimated fine amount indicating the overdue fine that would be charged on checkin, the patron name and the first two user-defined patron fields, the title, barcode, price and call number of any associated material.

_____Checkout/overdue and fine reporting can be configured to report on various limiting parameters:

 _____ Only checkouts currently overdue
 _____ Only checkouts overdue within a range of number of days
 _____ Only checkouts due within a specific date range
 _____ Only checkouts/overdues for selected patron types
 _____ Include patrons from other schools who have checkouts/overdues or fines for materials from the library user
 _____ Include patrons from the library who have checkouts/overdues or fines for materials in other libraries in the district
 _____ Only checkouts/overdues for selected material types
 _____ Only patrons with a selected name or range of patron names
 _____ Only patrons with a select user-defined patron field or range of user-defined patron fields (for example, homeroom teacher)

_____ User can print multiple overdue notices per page (2 or 4)

_____Checkout/overdue and fine reporting can be sorted by patron name or any of the user-defined patron fields (for example, by homeroom teacher).

_____The system allows the hiding of title on checkout/overdue and fine reporting to protect patron privacy.

_____The system allows the display of patron phone-number on checkout/overdue and fine reporting to protect patron privacy.

_____The system provides for communicating checkout/overdue/fine reports in both a list format (for internal distribution) and a notice format (for distribution to patrons).

_____The system provides for editing of the text on the checkout/overdue notice.

_____The system allows the user to define and save parameters for checkout/overdue/fine reporting once and then re-use the parameters whenever the report needs to be produced.

_____The system has the ability to print a list of overdue items by call number.

_____The system has the ability to print 'held item available notices' for mailing or distribution.

_____The system can produce a usage report showing the following information grouped by each Dewey range (000-999, including each 100's, 10's and 1 level) and/or call number prefix:

    _____ Number of circulations today
    _____ Number of circulations this month
    _____ Number of circulations this year
    _____ Number of total circulations
    _____ Number of copies in the collection
    _____ Number of copies with cataloged publication date
    _____ Average age of materials (based on publication date)
    _____ Number of copies with cataloged price information
    _____ Value of materials (based on actual and estimated copy price)
    _____ Number of copies in the collection

_____The system provides the usage report identified above at the district level – listing the same information for each school in the district.

_____The system allows limiting the usage report identified above to only items with combinations of the following parameters:

_____ Copies with selected Dewey ranges or call number prefixes

_____ Copies which have circulated today or within a specific date range

_____ Copies which have more or less than a specified number of circulations

_____The system allows drill-down from the usage report identified above to the following usage information on each specific copy in the collection:

_____ Number of circulations today

_____ Number of circulations this month

_____ Number of circulations this year

_____ Number of circulations last year

_____ Number of total circulations

_____The system provides a report of the copies that do not have cataloged call number information.

_____The system provides a report of the following information:

_____A count of items currently checked out

_____A count of items currently overdue

_____A count of items currently marked as lost

_____A count of ready hold requests (item is available to fulfill the hold)

_____A count of pending hold requests (item is not available to fulfill the hold)

_____A count of expired hold requests

_____A count of unpaid fines and the total amount associated with these fines

_____A count of all titles and copies in the collection

_____Number of circulations today, this month and this year (broken down regular checkouts, in-library usage, and renewals)

_____A count of renewals today and this year performed by patrons using patron empowerment features

_____A count of hold requests today and this year performed by patrons using patron empowerment features

_____A count of items circulated to patrons of other schools (interlibrary loans within the district) today, this month and this year

_____A count of hold requests by patrons of other schools (interlibrary loan requests within the district) today, this month and this year

_____A count of total holds placed today, this month and this year

_____A count of all patrons in the school (broken down by patron status)

_____The system provides a shelf list report sorted by call number, author and title for all copies or a specified range of copies (specified by Dewey number or call number prefix).

_____The system provides printing of patron and copy barcode labels, and spine labels (either in groups or individually).

_____The system can produce a summary-level usage report showing the following information grouped by each defined patron type, patron status, or user-defined patron field (with up to two levels of sorting by these fields):

  _____ Number of patrons

  _____ Number of circulations today

  _____ Number of circulations this month

  _____ Number of circulations this year

  _____ Number of total circulations

_____The system provides the usage report identified above at the district level – listing the same information for each school in the district.

_____The system allows the user to drill-down from the summary-level usage report above to same usage statistics at the individual patron level.

_____ The system allows the user to produce other custom reports using leading report writer applications and applications that support ODBC access to SQL Server 2005 databases.

_____The system must have the ability to run call number reports by:

  _____Copies with call number prefixes

  _____Copies with different call numbers (for the same title)

  _____Copies without any call numbers

  _____The system provides title and copy list that allows you to limit by:

  _____A range of titles

  _____One or all circulation types

  _____One or all categories

  _____The date a copy was added to the collection

  _____The date a title was added to the collection

  _____The date a title was updated

_____The system must have the ability to run a report that allows the staff to identify bibliographic headings that do not have corresponding authority 1xx headings.

_____The system must be able to run a report that shows collections for library materials for a specific time frame and can be organized by call number prefix or Dewey. The report can also be limited to a specific call number range.

_____The system must be able to run a report that shows patron circulations for library materials or textbooks. The report must be able to run for a specific time frame and can be sorted by Patron Status, Patron Type, and all user defined fields.

_____The system must be able to run a hold statistic report that has the ability to select by Title or Call Number and can limit by more than, equal to, or less than a certain number of holds for the year.

_____When printing patron barcodes, the staff must be able to select by patron name or any user defined field and limit the range.

_____The system must be able to print patron ID cards by Name, user defined field, or a list of barcodes.

_____The system must be able to run a patron name list report that will create a patron list by name, user defined field or uploaded file.

_____The library staff must be able to print spine/pocket labels and barcode labels based on items in a user defined list, by date added, or by a list of barcodes.

_____The system must have the ability to generate and print unused copy barcode labels.

_____In a holds report, the system must allow staff to customize the holds view to limit by date and/or holds status.

_____The system must allow staff to run a report to see library copies weeded from the collection based on specific criteria.

Optional Solution Specifications

Optional Implementation Requirements

_____The vendor will supply data services to convert bibliographic and holdings information provided by the district to the required MARC format for the proposed system.

_____The vendor will supply data services to perform custom cleanup of the district's MARC records, with specific services to be defined based on an analysis of the district's data.

_____The vendor will supply data services to perform custom cleanup of the district's MARC records, with specific services to be defined based on an analysis of the district's data.

_____The vendor will supply data services to process the district's bibliographic records to update and enhance records for additional content (access points for searching).

_____The vendor will supply data services to add the Study Program Information Note (526 tags) to bibliographic records to identify books that are tied to reading programs such as Accelerated Reader and Reading Counts.

_____The vendor will supply data services to add the Lexile measures (521 tags) to bibliographic records.

Optional Requirements for Access to Cataloged Websites

_____A subscription service is requested to provide automatic links to K-12 approved websites directly from within the searching interface. Links are based on subject headings and are available from browse search results, and individual bibliographic displays. Obsolete and newly inappropriate Internet sites are removed to ensure access to only safe, relevant web sites are viewable. The subscription service should provide statistics on level of usage/access for each subject area.

Optional Requirements for Access to Enhanced Content in Search Interface

_____A subscription service is requested to provide enhanced content in the search interface including display of book covers, book reviews, summaries or tables of contents for titles.

_____The service provides display of the book cover within search results and on the bibliographic display for patrons.

_____The service provides access to the additional enhanced content from the bibliographic display for patrons.

Optional Requirements for Metasearching

_____A subscription service is requested to allow the user to submit one search expression and retrieve matches from the library collection and other paid or free subscription online databases.

_____ The service enables users to search multiple online resources, such as other online library catalogs, subscription-based electronic databases, and Z39.50 clients.

_____ The service provides results from the various resources in one hit list.

_____ The service does not require the user to enter a password or ID for each database searched.

_____ The service allows for searching of online databases for K-12 schools such as Britannica®, Electric Library, InfoTrac® and a number of free Internet databases.

_____ The service allows the user to decide which resources to search.

_____ The service allows Boolean operators to be used in subject, title, abstract, keyword, and author searches.

Optional Requirements for Ongoing Reading Program Data Enhancement

_____A subscription service is requested to automatically update the database with reading program reading level, point value and quiz number information based on information obtained from Accelerated Reader and/or Reading Counts.

_____The service allows each individual school to upload test information as often as desired throughout the school year and records are updated automatically with reading program information to support searching.

_____The service identifies titles that match with quizzes owned by the school.

_____The service identifies quizzes that cannot be matched to titles in the school's collection.

_____The service identifies titles that cannot be matched to quizzes in the school's collection.

Optional Requirements for Audio-Visual Bibliographic Records

_____A subscription service is requested to provide MARC21 records for commonly used K-12 audio-visual (non-print) materials.

Optional Requirements for State and Provincial Standards

_____A subscription service is requested to support searching of curriculum standards.

_____The service allows authorized users to search the standards by state or province, curriculum area and grade level.

_____Matching standards search results can link to websites or titles in the collection that support a lesson plan associated with the selected standard.

_____The service allows separate searching within the library module allowing an efficient way to view website only results.

Textbook Management

Setup

The system must:

_____Include access to setup options for all modules in one common setup area.

_____Allow the user to add, edit or delete multiple sites within a district from a central location.

_____Allow the user to add, edit or delete site information including site name, district identification and customer number.

_____Allow the user to add, edit or delete school departments.

_____Allow the user to add, edit or delete budget categories.

_____Include the ability to add, update or delete classes by entering teacher's barcode or selecting teacher's name.

_____Allow the user to include the period, description, location, department, class start date, class end date, as well as due dates for textbooks circulated for that specific class.

_____Allow the user to add, edit or delete publisher and vendor information.

_____Include the ability to add, edit or delete textbook loan periods that include: description, start date, end date, and due date.

_____Include the ability to select one of the defined loan periods as the default due date for circulation.

_____Include the ability to support multiple barcode symbologies up to 14 characters in length.

_____Include the ability to print replacement textbook barcode labels, including site name, title, author and location on the barcode label.

_____Include the ability to print unused textbook barcode labels, including site name on the barcode label.

_____Allow for the selection of preferred barcode symbology and setup of barcode information for both patron and textbook barcodes. Barcode information must include barcode length, and fixed characters.

_____Include the ability to set up textbook loan policies from a common setup screen.

_____Allow the user to set the maximum checkouts for patrons.

_____Allow the user to block transactions due to fines or overdues.

_____Allow the user to override blocked transactions.

_____Allow the user to customize bills/notices text.

_____Allow the user to customize fine descriptions, select calculation methods (fixed fine amount, percentage of copy replacement cost, or original purchase price).

_____Include the ability to assign each copy one of at least five copy condition descriptions with related percent values.

_____Include an auto-conditioning option that allows the user to define the number of circulation cycles before the condition of a textbook is automatically changed to another copy condition.

_____Include the ability to setup calendar days and hours open.

_____Provide the ability to configure unlimited access levels (security rights), and specify what functionality is available to an individual user.

Textbook Circulation

The system must:

_____Provide the most commonly performed tasks at one screen, including the following: Check Out, Check In, Fines, Renewals, Copy Status, Lost Copies and Offline Circulations.

_____Include the ability to retain the barcode and associated patron when moving to another Circulation module.

_____Include the ability to circulate textbooks across the district as well as pay fines across the district.

_____Must allow the user to easily switch between common functions during normal operation, using a mouse or keyboard.

_____Include the ability to enter a patron barcode using a scanner or keyboard.

_____Include the ability to search by patron name if patron barcode number is unknown.

_____Include the ability to allow for use of ID numbers instead of barcodes for checkout purposes.

_____When a patron barcode is entered, display that patron's circulation information, along with the patron's name and ID number.

_____Include the ability to enter a copy barcode using a scanner or keyboard.

_____Include the ability to search by title during checkout if the copy barcode number is unknown.

_____Display all copies attached to a title record during a title search and allow for the selection and check out of any available copy.

_____Include the ability to display all related patron information while in the Check Out option, including notes.

_____Make the following patron information accessible while in the Circulation module: name, status, barcode number, card expiration date, patron type, ID number, graduation year and copies with check out and due dates.

_____Make the following checkout information available for each patron while in the Circulation module: textbook checkouts, textbook title, copy barcode, price, check out and due dates of that copy.

_____Make the following additional checkout information accessible for each patron while in the Circulation:

     _____Textbook checkout statistics for that patron, including current checkouts, total number of fines and the balance due.

     _____Fines information, including title, copy barcode, fine type, amount of fine paid, amount of fine waived, and fine balance.

_____Include the ability to print patron status from checkout, which provides a snapshot of a patron's current checkouts and fines. The report must include statistics on the total number of checkouts, overdues, and fines and total fine amount. It also must include a list of copies checked out, copies overdue, and copies with a fine.

_____Textbook fields of publisher, department, fine type and budget category must contain default data to aid in entry of data. Drop downs can be edited to add or remove desired information.

_____The system can run a condition or status report for the district, a site type, or an individual site. The report can be a summary or by budget category, publisher, or vendor and can limit by condition/status and choose whether to include title details.

_____A report can be run on duplicate barcodes across the whole district, between schools of a given site type or between two specific schools.

Check Out Functionality

The system must:

_____Offer textbook checkout by patron where the application prompts for patron information (barcode, name) and textbook information (barcode, title) and copy chosen is checked out to patron selected. Ability to select due date must be available.

_____Include the ability to notify the user if the due date selected is not a default system date as defined by the user or is a date that is prior to the current date.

_____Offer textbook checkout to student by class with the following options: First, by entering a teacher's barcode or name first, textbooks are checked out to an entire class, one student at a time, without re-entering class information. Second, if the student's barcode is entered first, the textbooks are checked out for all of the student's classes without re-entering student information.

_____Offer textbook checkout to teacher where the teacher's barcode or name is chosen, a specific class can be selected, the copy's barcode is entered and the copy is checked out to the teacher for the class specified. A report can be printed detailing the checkouts. The report can be used later to assign the textbooks to individual students in the class in the system and textbook reassignment can be performed directly through the system.

_____ Ability to select due date must be available.

_____ Include the ability to check out copies previously identified as "lost" by responding to a system prompt indicating copy's previous status.

Check In Functionality

The system must:

_____ Include the ability to enter the barcode of a copy to be checked in using a scanner or keyboard.

_____ Include the ability to search for a copy by title, and then select the appropriate copy to be checked in.

_____ Display selected copy check out information including title, and barcode, due date, condition on return, patron, patron type, teacher, and class.

_____ Include the ability to add a fine, add a copy note, change the textbook condition, and view patron information.

_____ Include the ability to check in copies previously identified as "lost" by responding to a system prompt indicating copy's previous status.

Textbook Fine Functionality

The system must:

_____ Include the ability to enter a patron barcode using a scanner or keyboard to access that patron's fines information.

_____ Display the following information when a patron barcode is entered: name, patron barcode number, patron ID number, number of items currently checked out, number of overdues, and total fines.

_____ Include the ability to display all related patron information while in the Fines option, including notes.

_____ Include the ability to display fine information including title, barcode and amount of fine for each fine associated with a specific patron.

_____ Allow the user to add a fine by entering the patron (by barcode or name) and creating a new fine for a specific copy. Fine creation includes identifying the barcode, fine type, title, fine amount, amount paid, amount waived and amount due.

_____ Provide the option to act on a textbook fine as follows:

_____ Create a new fine for a specific copy

_____ Apply a payment to a single fine

_____Apply a partial payment to a series of fines, with oldest fines being paid first

_____Waive a partial fine or an entire fine

_____Edit a fine amount.

_____And delete a fine without applying a payment

_____Ability to add custom fine types on the fly.

_____Allow the user to add user-defined fines for patrons.

Textbook Renewal Functionality

The system must:

_____Include the ability to enter a patron barcode using a scanner or keyboard to preview all information about the patron holding a copy before a decision is made regarding the type of renewal to be done.

_____Include the ability to renew all copies currently checked out to a patron.

_____Include the ability to renew specific copies checked out to a patron.

_____Include the ability to enter the barcode of a copy to be renewed using a scanner or keyboard.

_____Display the following information about a copy being renewed: patron name, patron barcode number, copy barcode number, and confirmation of new due date.

_____Include the ability to activate a new due date and override the default system due date during the renewal process.

_____Provide the ability to renew all copies checked out to a teacher or specific copies checked out to a teacher.

_____Provide the ability to renew copies (checked out to patrons) that are linked to a teacher or to a teacher's selected class.

_____Provide a function for transferring (from one teacher/class to another teacher/class) selected or all copies checked out to patrons linked to the teachers/classes or copies checked out to a specific individual linked to the teachers/classes.

Textbook Copy Status Functionality

The system must:

_____Make the following checkout information available in the copy status module: title, author, barcode, due date, status, price, location, name of patron to whom copy is

currently checked out, patron type, patron barcode number, patron ID number, grade level, homeroom and five user-defined fields for that patron.

_____Make the following prior checkout information available in the status module: date copy was returned, name of patron who last had copy checked out, patron type, patron barcode number, patron ID number, grade level, homeroom and five user-defined locations for that patron.

Lost Textbook Copy Function

The system must:

_____Include the ability to change the status of a copy to "lost" and assign an appropriate fine to the patron record. The system must track the last patron who had the copy.

_____Automatically calculate fines for lost copies and attach those fines to the appropriate patron record when the copy's status is changed to lost and the option to create a fine is accepted.

_____If a lost copy is checked in, indicate a refund is due to the patron who paid a fine for the lost copy.

Offline Textbook Circulation Function

The system must:

_____Provide flexible methods for collecting remote circulation information by giving the use the option is either use a portable hand-held device, thin client utility or ability to enter/scan barcodes directly into a simple text file.

_____Ability to reject a remote transaction if a copy barcode is not in the system.

_____Ability to print all remote transactions.

Patron Maintenance

The system must:

_____Allow the user to add, edit, view or delete patrons.

_____Include the following patron information: barcode, last name, first name, middle name, district ID number, identify as a teacher, patron type, gender, graduation year, birth date, card expiration date, five searchable user-defined fields, patron status, and two address fields (including phone numbers and email address).

_____Include the ability to add unlimited patron notes and/or messages.

_____Include the ability to add or import patron pictures.

_____Include the ability to search for patron by name, barcode number, user-defined fields, grade level, homeroom, nickname or ID number as well as other fields.

_____Include the ability to define, edit or delete an unlimited number of patron types.

_____Support at least three patron statuses including Active, Inactive, and Restricted.

_____Include the ability to set any patron type as the default patron type, which is added when importing new patron records or when manually creating new patron records.

_____Include the ability to require a barcode or ID number for each patron record.

_____Allow the user to access all textbook checkout information for a patron while viewing the patron record, including checkouts (including title, barcode number of item, due date and status), unpaid fines information including title, barcode number and amount of fine.

_____Allow the user to access all textbook statistics for a patron while viewing the patron record, including: number of checkouts, overdues, and total fines due.

Patron Update

The system must:

_____Provide the ability to globally update patrons based on: patron type, five user-defined fields, grade level, homeroom, graduation year, card expiration date, currently teaching status, patron status and access level.

_____Include the ability to update the patron type, five user-defined fields, grade level, homeroom, graduation year, card expiration date, currently teaching status, patron status and access level fields for an individual patron.

_____Provide the ability to globally delete patrons based on: grade level, homeroom, graduation year, card expiration date, patron type and patron status. Allowing the user to allow patrons to be deleted even if they have outstanding transactions.

_____Include the ability to import, edit or transfer patrons from one school to another school in the district.

_____Provide the ability to import patron data in an XML format, which can be used to add/update patrons from another system such as a student information system.

Patron Import/Export

The system must:

_____Include the ability to accept patron records from an ASCII comma-delimited file.

_____Include the ability to choose how to process duplicate patron records by skipping the incoming record, replacing the existing record or merging with the existing record.

_____Include the ability to choose the method of duplicate record detection by matching either patron barcode or ID number.

_____Include the ability to export patron records to an ASCII comma-delimited file.

_____Include the ability to export all patron records.

_____Include the ability to limit export patron records by patron status (all patrons, active, inactive, restricted), patron type (all patrons or selected patrons), grade level, homeroom, card expiration date, or by graduation year.

Student Schedule Information

The system must:

_____Allow user to add, edit, view student schedule information.

_____Include the following student schedule information: department name, class name, class ID, section ID, period, day(s) of the week the section meets, date class begins and ends, students and teacher that are assigned to the class, textbooks that are assigned to the class.

_____Provide the ability to import student schedule data in an XML format, which can be used to add/update schedule data from another system such as a student information system.

Textbook Catalog

The system must:

_____Allow user to add, edit, view or delete textbook titles.

_____Allow central cataloging of textbooks.

_____Allow central cataloging of textbooks without having to enter barcode, copy, or school information.

_____Support a district-wide cataloging user to add, edit and view all district textbook titles and copies.

_____Provide the ability to add the cover image to the textbook record.

_____Include the ability to manage eTextbooks.

_____Include the ability to delete individual copies by just scanning or entering the barcode.

_____Include the ability to delete copies in batch by scanning or entering barcodes (with or without a portable handheld device) to build a file of copies to be deleted from the textbook collection. When the user is ready all copies in the file can be deleted and a report produced.

_____Include the ability to search the existing title database by title, author, ISBN, or barcode number.

_____Support a single title record with multiple copies linked to that record.

_____Include a built-in default template that includes all valid user-defined material types.

_____Provide easy cataloging of textbook information including title, authors, edition, copyright, ISBN, material type, budget category, course ID, grade level (from/to), publisher name and catalog number, vendor name and catalog number, replacement price, and title note.

_____Include the ability to add, edit and delete adoption information including text ID, state adopted date, district adopted date and when the adoption ends.

_____Include the ability to add, edit and delete teacher's editions and kits, assigning them to a main entry title.

_____Make available copy statistics for a specific title. The statistics must include a count for the total copies, the number out, available, or lost.

_____Offer a select list of all copies of this title by barcode and include the title, barcode number of the item, location, condition, and current status.

_____Include options to add a single copy, edit a copy, delete a copy, and add a range of copies.

_____Include the following copy information: titles, status, number of copies, starting barcode, condition, location, date acquired, purchased price and copy note fields.

_____Include the ability to view the availability status of a copy while in the textbook module.

_____Display, if the item is checked out, the patron name to whom the item is checked out, including the following information: due date, patron type, patron barcode number, grade level, homeroom and associated teacher and class.

_____Make available prior checkout information when viewing a copy record in the textbook module.

_____Include the following prior checkout information: date returned, patron name, patron type, barcode number, grade level, homeroom and five user-defined patron location codes for that patron.

_____Include the ability to delete copy information, leaving the textbook title record intact.

_____Include the ability to merge duplicate textbook titles.

_____Include the ability for site staff to transfer and track textbooks to another site within a district.

_____Include the ability for district staff to transfer and track textbooks between any sites within a district.

_____Include the ability to print a summary of the textbook transfer.

_____Include the ability to cancel any textbook transfer.

_____Include the ability to receive textbook transfers into inventory by scanning item barcodes. Any missing items should be marked Lost by the system automatically. The system should allow a user to mark all items received with a single click.

_____Include the ability to manage textbook transfers via wireless handheld device, accessing the system directly via an optimized web interface.

Textbook Title Import/Export

The system must:

_____Include the ability to import textbook title record data from an ASCII comma-delimited file.

_____Include the ability to import records from any valid drive and/or subdirectory, including network drives.

_____Include the ability to import textbook titles from an online textbook subscription service that includes information on state adoption. The users can limit the records search by their adoption state.

_____Include the ability to check for duplicate records based on a match of the title or standard number (ISBN).

_____Include the ability to skip the incoming record or replace the existing record if a matching record already exists.

_____Attach copy information to an existing textbook title record if a matching record exists, to avoid creating duplicate textbook title records.

_____Include the ability to check for duplicate copy information based on a match of the barcode number.

_____Reports the number of records read; number of errors encountered; and number of titles and copies added, replaced, and skipped.

_____Automatically generate a report listing any errors encountered and/or corrections made to records during the import process.

_____Include the ability to view exception reports prior to printing or saving the report.

_____Include the ability to export all records.

_____Include the ability to export to any valid drive, including network drives.

Textbook Reports

The system must:

_____Include the ability to preview and print selected reports.

_____Include the ability to save reports to a file and access previously run reports at a later date.

Checked Out/Overdue Materials & Unpaid Fines

_____Provide the ability to report on materials checked out or overdue, as well as who has unpaid fines.

_____Includes the ability to print report or notice formats.

_____Includes the ability to limit reports by patron type, patron status, library items, and textbooks (if integrated with the library and textbook modules).

_____Includes the ability to select range and sort options including patron name, grade level, homeroom and five user-defined fields.

_____Provide options to include library title (if library module purchased), copy price, patron barcode, patron phone number, subtotals and ability to start a new page for each group.

_____Includes the ability to distribute notices internally or externally, page layout options, custom notice text and support of double window envelopes (#10) that include patrons address and site's return address.

Textbook Statistics

_____Provide textbook statistics reporting that includes circulation counts, fines, materials (number of titles and copies) and patron information.

_____Includes overall checkouts for today, this month and this year.

_____Ability to see if other sites in the district have available textbook copies.

Patron Statistics Summary

_____Provide patron statistics reporting that includes textbook circulations (today, this month, this year and totals).

_____Ability to group report by patron type, patron status, grade level, homeroom and five user-defined patron fields.

_____Ability to drill into groups to see individual patron statistics.

_____Ability to limit report by patron type and patron status.

Class List

_____Provide the ability to generate a report that contains a list of teachers and their classes, along with the ability to include patron transactions.

_____Include the ability to sort by teacher's name and option to start a new page after each teacher.

_____Include the ability to show all students assigned to a class as well as if they have textbooks checked out.

_____Include the ability to limit report by class period range.

_____Include the ability to limit textbooks by status for each class.

Title and Copy List

_____Provide title and copy reports with range and sort options including title, publisher and vendor.

_____Include title information and copy count summary.

_____Include the ability to include or exclude copy specific information.

_____Include the ability to limit the report based on copy status. (available, checked out, loaned out, on order, out for repair, in-transit and lost)

_____Include the ability to limit the report based on copy condition. (new, good, fair, poor and unusable)

_____Include the ability to include or exclude the teacher's editions and/or resource kits.

_____Ability to transfer copies of textbooks into a holding area.

Textbook Adoption List

_____Provide textbook adoption reporting with range and sort options including title, publisher and vendor.

_____Include the ability to include or exclude copy specific information.

_____Include the ability to limit the report by specifying the beginning and ending State Adoption Year, District Adoption Year, or End Adoption Year.

Patron Barcode Labels

_____Provide ability to print both used and unused patron barcodes.

_____Include the ability to sort by patron name, grade level, homeroom and user-defined patron fields.

_____Include the ability to limit by patron type and patron status.

_____Include formatting options for multiple barcode label stocks.

_____Include the ability to print barcodes for use at circulation desk, including textbook circulation command codes.

_____Include the ability to print a range of unused patron barcodes that can fill in gaps in the assigned barcode range.

District Textbook Statistics

_____Provide the ability to see statistics for all sites within a district, including textbook and patron counts, overall checkouts and overdues, fines and amount due and the collection value for each site.

Student to Textbook Statistics

_____Provide the ability to see statistics for textbook assignment by class for all sites or for a specific site within a district, including textbook and patron counts, overall surplus and any shortages.

Weeding

_____The system must allow staff to run a report to see textbook copies weeded from the collection based on specific criteria.

Inventory

The system must:

_____Include the ability to enter copy barcodes directly into inventory by typing or scanning barcodes.

_____Include the ability to check in a copy that had been checked out to a patron when it is encountered. Interactive messages must notify the user when copies that are checked out or lost are inventoried. The system must track and report on refunds owed to patrons for the return of "lost" copies and for which a fine had been paid.

_____Include the ability to enter copy barcodes into inventory using a portable handheld device or remote thin client utility.

_____Provide the ability to include an exception report that includes a refund log that tracks refunds owed to patrons for the return of lost copies for which fines had already been paid.

_____Indicate number of copies inventoried as well as number remaining uncounted.

_____Provide the ability to conduct a partial textbook inventory by location.

_____Provide the ability to restart the inventory process.

_____Include the ability to set all uncounted items to a status of lost. The system must also indicate the date the item was lost.

_____Include the ability to reset all copies marked as 'lost' in inventory to 'unaccounted' for.

_____Include the ability to reset all copies marked as lost on a specific date to unaccounted for.

Media Management

General

_____ The media management software is designed exclusively with a K-12 focus.

_____Onsite and remote project management is available from the vendor.

_____Onsite and remote software installation is available from the vendor.

_____Non-print data conversion from your existing database is available from the vendor.

_____A subscription to a database for non-print MARC records is available from the vendor.

_____Onsite and web-based training for the media management software is available from the vendor.

_____The software allows seamless switching between media, circulation, and textbook modules.

_____The software allows customizable administrative views.

_____The software allows automated media data backups and patron data updates.

_____The software allows customizable security levels.

Circulation

_____The system allows for instructional material to be reserved for a future timeframe or checked out immediately.

_____The system is capable of checking instructional media material in and out via barcode labels.

_____The system generates a list for the instructional materials to be picked and shipped.

_____The system will generate booking labels to facilitate the shipping process.

_____The booking labels will display the call number, title, patron name, shipping date, return date, zone number, and name of the site sending the material.

_____The system will generate packing lists that display the teacher name, title, call number, site shipped to, copy number, and date due,

_____The system allows authorized users to view the status of an item in the patron status area.

_____The system allows staff to define loan periods for different types of media items as well as how many times a booking may be extended.

Searching

_____The system will display instructional media material with a description of the item, current borrower, due date, and who needs the item next.

_____The system will not display instructional media material in the student OPAC.

_____The system is browser-based.

_____The system has 24/7 centralized access via any Internet enabled computer.

_____The system allows teachers to search multimedia materials for the classroom by curriculum needs.

_____The system shows the age of the material requested in the search results.

_____The system shows the availability status of the material requested in the search screen.

_____When teachers reserve material, they will get immediate feedback if the material is available for the all the desired dates or some of them.

_____The system allows searching support of State Standards.

Booking

_____The system must be able to let the user book multiple copies of a title with one booking request.

_____The system allow the user to select and store titles for booking and then allow the user to book multiple titles at one time.

_____The system allows the user to quickly see what dates the items are available when making a booking request.

_____The system will generate an email to the user if the booking notification has been declined.

_____The system must allow the user to extend or edit a booking request easily. If the user editing the booking is not the original requesting patron, a notification of the date change is emailed to the user who requested the item.

Cataloging Instructional Media

_____The system must store instructional media material separately from the library material.

_____The system must import and export non-print MARC records.

_____The system allows the cataloger to hand key non-print MARC records.

_____The system must allow images of media to be added to the record.

Shipping

_____The system must allow the staff to scan the item barcodes or let the system automatically pick the copies of items ready to ship.

Reports

_____The system must generate overdue lists.

_____The system must generate circulation statistic reports.

_____The system must generate usage statistic reports.

_____The system must print packing lists with teacher name, title, call number, site shipped to, copy number, barcode, date due, ship date, and patron number.

Inventory

_____The system is capable of supporting an inventory of the instructional media material without impacting the ability to circulate items.

_____The system is capable of supporting full or partial instruction media inventory.

Asset Manager

General

The system must:

_____Allow browser-based management of fixed and portable assets.

_____Optimize access, availability and use of assets and identifies asset accountability throughout the district.

_____Provide the ability to track fixed and portable assets including, but not limited to, software licenses, maintenance equipment, computer hardware, assistive technology aids, video systems, sports equipment, uniforms, buses, curriculum kits, and fixed assets that require maintenance.

_____Be specifically designed for the unique needs of the K-12 school district.

_____Provide comprehensive information about each asset, tracking its history from purchase to retirement.

_____Be installed and maintained centrally at the district.

_____Allow authorized users to search, manage, circulate, prepare inventory and create reports for assets.

_____Uses wireless scanner technology for greater speed, ease and accuracy.

_____Be SIF certified.

Setup

The system must:

_____Include access to setup options for all modules in one common setup area.

_____Allow the user to add, edit or delete multiple sites within a district from a central location.

_____Allow the user to add, edit or delete site information including site name, district identification and customer number.

_____Include the ability to add, edit or delete asset loan periods that include a description and desired loan period. Loan periods could be for a specific or fixed date, a certain number of days or unlimited.

_____Include the ability to define a system default due date.

_____Include the ability to assign asset loan periods to the specific asset types from a common setup screen.

_____Include the ability to define, edit or delete an unlimited number of patron types.

_____Include the ability to assign which asset types the various patron types are allowed to check out from one common setup screen.

_____Provide the ability to configure unlimited access levels (security rights), and specify what functionality is available to an individual user.

_____Allow the user to block transactions due to patron type not having permission to check out a specific asset type.

_____Allow the user to override blocked transactions.

_____Include the ability to setup calendar days and hours open.

_____The system allows each school to maintain a calendar that identifies closed days.

_____Include the ability to support multiple barcode symbologies up to 14 characters in length for items, locations and patrons. Barcode information must include barcode length and fixed characters.

_____Allow the user to customize up to five patron fields and configure the display of the locally defined fields in the circulation functions, if desired.

_____Allow the user to add locations, assign and print barcodes for the newly added locations.

_____Allow the user to edit or delete locations.

_____Allow the user to add, edit or delete school departments and include who is the head of the department.

_____Allow the user to identify the school principal.

Cataloging

The system must:

_____Provide a system-wide asset data file.

_____Support a central cataloging model where the district cataloger can maintain asset and item information for each school from a single login.

_____Allow asset cataloging at the district level without assigning a barcode, adding an item, or assigning it to a site.

_____Support a school-level cataloging model where each school has rights to maintain asset and item information.

_____Allow the cataloger to locate asset records added by other schools as part of adding an asset to facilitate keeping the number of duplicate records in the system at a minimum.

_____Include a built-in default template that includes all system and required fields for both an asset and associated item.

_____Support asset templates for an unlimited number of asset types.

_____Allow asset templates to be organized into hierarchical groups and subgroups to simplify data entry and asset search.

_____Allow asset templates to include asset description fields such as the name of the asset, the manufacturer, model number, a replacement price, and so forth, with the ability to add fields appropriate to the specific asset type.

_____Allow asset templates to include item specific fields, such as the barcode, status, condition, home location, custodian, department, funding source, district identifier, purchase price, date acquired, purchase order, serial number, salvage value and projected life.

_____Allow asset template fields to be optional or required, of a specific data type including currency, date, dropdown list, memo, number, text or yes/no checkbox.

_____Allow user to populate dropdown lists to minimize data entry and maximize data consistency. Dropdowns can be edited to add or remove desired information

_____Allow user to add, edit, view or delete asset records.

_____Support a single asset record with multiple items linked to that record.

_____Provide the ability to add the digital photo of the item to the asset record.

_____Allow the cataloger to duplicate an asset record as a template for adding similar asset records.

_____Allow the cataloger to duplicate an item record as a template for adding new items.

_____Include options to add a single item, edit an item, delete an item, and add a number of items at one time.

_____Include the ability to add "On Order" items with or without a barcode.

_____Allow software programs loaded onto a computer to be connected and tracked with hardware.

_____Include the ability to assign automatically a software license to all items specified in an item barcode list or an item barcode file.

_____Include the ability to upgrade automatically software in order to remove software licenses currently assigned to items and replace them with other software license assignments.

_____Allow the cataloger to maintain individual records that capture information for each specific item in the collection.

_____Allow an individual asset or item record to be retrieved and modified at any time, once it has been entered.

_____Include the ability to search the existing asset database by asset type, "Starts with" and keyword.

_____The system must have the ability to add an asset without having to perform a search for the asset first.

_____Allow for updates of individual assets.

_____Allow for updates of a subset, or batch, of assets.

_____Allow for global updates of all assets.

_____Include the ability to delete item information, leaving the asset record intact.

_____Include the ability to delete individual items by just scanning or entering the barcode.

_____Include the ability to delete items in batch by scanning or entering barcodes to build a file of items to be deleted from the asset collection. When the user is ready all items in the file can be deleted and a report produced.

_____When the last item of an asset is deleted, remove the asset from the collection.

_____Users must be able to see item status from cataloging, as well as from circulation.

_____Offer a select list of all items of an asset record by barcode and include the asset name, barcode number of the item and condition.

_____Include the ability to view the availability status of an item while in the asset module.

_____Include the ability to merge duplicate asset records.

_____Include the ability for site staff to transfer and track assets, currently in the database or "On Order," to another site within a district.

_____Include the ability for district staff to transfer and track assets, currently in the database or "On Order," between any sites within a district.

_____Include the ability to print a summary of the asset transfer.

_____Include the ability to cancel any asset transfer.

_____Include the ability to receive asset transfers into inventory by scanning item barcodes. Any missing items should be marked Lost by the system automatically. The system should allow a user to mark all items received with a single click.

Searching

The system must:

_____Include the ability to search for assets that start with certain characters.

_____Include the ability to search for assets by keyword.

_____Allow the user to limit searches based on asset type.

_____Include the ability to browse for asset by asset type.

_____Include the ability to search for items by barcode, district identifier, purchase order or serial number.

_____Include in the search results the search term that was used to produce the result list.

_____Provide keyword searches that support internal or imbedded truncation (wildcards), e.g., one entry can retrieve 'woman' and 'women', or 'organization' and 'organisation' and phrase searching.

_____Accommodate Boolean searches using terms in AND, OR, and NOT relationships.

_____Allow variations in punctuation, capitalization, use of diacritics, and spacing so that search entry does not impede searching.

_____Allow the patron to sort the search results by asset name, asset type and relevance.

_____Include a system-contained stop list of words that automatically excluded from searches to minimize the number of unnecessary hits.

_____Allow the staff to configure searching options and patron empowerment functions available to different groups of patrons or staff.

_____Provide patron empowerment functions to permit authorized patrons to view and print their own checkouts.

_____Save search preferences for users based on their login.

_____Allow the user to create and save a list of assets.

_____List the number of hits retrieved from a search request and will provide navigation controls to move between the hits.

_____ Include the ability to print any information from the searching interface including individual asset information, the search results or the user-maintained list of items of interest.

_____Allow the patrons to search for items within their school, across all schools in the district, or in selected groups of schools.

_____Display the following information for each asset in the search functions for items held by other schools: asset name, barcode, circulation status, condition and school.

_____Show the availability status of the asset requested in the search screen.

Record Import/Export

The system must:

_____Include the ability to import asset record data from an XML file.

_____Include the ability to import records from any valid drive and/or subdirectory, including network drives.

_____Include the ability to import a file to add new records or update existing records.

_____Include the ability to check for duplicate records based on a match of the displayable name and asset type.

_____Include the ability to skip the incoming record if a matching record already exists.

_____Attach item information to an existing asset record if a matching record exists, to avoid creating duplicate records.

_____Include the ability to check for duplicate item information based on a match of the barcode number.

_____Reports the number of records read; number of errors encountered; and number of asset records and items added, replaced or skipped.

_____Automatically generate a report listing any errors encountered and/or corrections made to records during the import process.

_____Include the ability to view exception reports prior to printing or saving the report.

_____Include the ability to export all records to an XML file.

_____Include the ability to export to any valid drive, including network drives.

_____Allow the user to delete asset and item records after export. Items currently checked out should not be deleted.

_____Provide a report showing the number of asset records exported and, optionally, the number deleted, and a listing of the assets and items deleted.

Circulation - General

The system must:

_____Restrict access to circulation functions and records to authorized persons.

_____Provide the most commonly performed tasks at one screen, including Check Out, Check In, Asset Status and Patron Status.

_____Allow the user to easily switch between common functions during normal operation, using a mouse or keyboard.

_____Include the ability to enter a patron barcode using a scanner or keyboard.

_____Display that patron's circulation information, along with the patron's name when a patron's barcode is entered.

_____Allow for use of an ID number instead of barcode for checkout purposes.

_____Include the ability to search, if patron barcode or ID number is unknown, by any portion of the patron's name (first, last, middle and nickname), grade level, homeroom and up to 5 user-defined patron fields to select the patron.

_____Provide access to patron records by barcode number, any portion of the patron's name (first, last, middle and nickname), grade level, homeroom and up to 5 user-defined patron fields, in the circulation functions.

_____Allow for editing of patron information directly from within the circulation functions.

_____Provide access to asset records by barcode, asset name or keyword in the circulation functions.

_____Include the ability to retain the barcode and associated patron when moving to another Circulation module.

_____Include the ability to reset the display of circulation functions and clear patron information to protect patron privacy.

_____Include the ability to circulate items to patrons from other schools in the district, if desired, to support resource sharing within the district.

_____Include the ability to circulate items to departments in other schools in the district, if desired, to support resource sharing within the district.

_____Provide for scanning of barcode labels affixed to patron cards and items.

_____Update online circulation transactions in real time.

_____Permit staff to easily determine the current circulation status of any item (whether any particular item is currently in circulation, when it is, or was, due back, if the item is marked as lost) from directly within the circulation functions.

_____Provide audible and visual signals to indicate:

_____Acceptance of the patron card

_____Acceptance of the item identification number

_____Any condition that must be reviewed for the transaction to complete

_____Provide lists of each outstanding checkout for the patron in the checkout function when the patron record is accessed.

_____Make the following patron information accessible while in the Circulation module: name, status, barcode number, card expiration date, patron type, ID number, graduation year and items with check out and due dates.

_____Make the following checkout information available for each patron while in the Circulation module: asset checkouts, asset name, item barcode, check out and due dates of that item.

_____Allow the staff to define patron notes that are automatically displayed in the circulation functions when the patron is identified for a transaction.

_____Provide the staff with notification of automatic blocks in circulation for conditions including:

_____Patron has overdue materials

_____Patron has expired card

_____Inactive or restricted patron

_____Patron attends another school

_____Provide access to asset/item records in circulation function by barcode, or asset name keywords in the circulation functions.

_____Display all items attached to an asset record during an asset search and allow for the selection and check out of any available item.

_____Allow limiting patrons to use of specific types assets.

_____Provide authorized staff the ability to override loan periods and specify special due dates.

_____Include the ability to enter a item barcode using a scanner or keyboard.

_____Alert the user that an item previously marked as lost is being checked-out.

_____Alert the user that an item previously marked as lost is being checked-in.

_____Alert the user that an item not previously checked-in is being checked-out.

_____Provide username/password controlled block overrides.

_____Include the ability to allow for use of ID numbers instead of barcodes for checkout purposes.

_____Allow authorized users to view the status of an item in the patron status area.

_____Include the ability for the system to determine loan periods from the asset and patron types.

_____Only require one entry of patron identification per batch of items to be checked out to that patron at that time

_____Allow limited access to the circulation features, so aids or student helpers can circulate items.

_____Include the ability to print patron status from checkout, which provides a snapshot of a patron's current checkouts. The report must include statistics on the total number of checkouts and overdues. It also must include a list of items checked out or overdue.

_____Include the ability to enter an item barcode using a scanner or keyboard.

_____Include the ability to search by keyword during checkout if the item barcode number is unknown.

_____Permit the staff to easily view if the patron is in violation of any configured asset policies, the patron's outstanding transactions, the patron's school and personal demographic information, and a picture of the patron.

_____Allow each school to configure the display of the locally defined patron fields in the circulation functions, if desired.

_____Allow for all loan policies and circulation parameters/configuration to be defined on a school-by-school basis.

_____Accommodate the circulation of a variety of asset types.

_____Support the retention of historical records on asset use, and also limits display of individual patron use information to protect the privacy of patrons.

_____Retain history after deleting item information.

_____Retain history after deleting patron information.

Check Out Functionality

The system must:

_____Offer asset checkout to patron where the application prompts for patron information (barcode, name) and asset information (barcode, asset name) and item

chosen is checked out to patron selected. Ability to select due date must be available.

_____Offer asset checkout to department where the application prompts for the school and department, then item. Additional items are checked out without re-selecting the school and department. Ability to select due date must be available.

_____Offer asset checkout to location where the location's barcode or name is chosen, the item's barcode is entered and the item is checked out to the location specified. Ability to select due date must be available.

_____Include the ability to check out items previously identified as "lost" or "stolen."

_____Include the ability to easily view, in Check Out, all related patron information including the patron's outstanding transactions, the patron's school and personal demographic information, notes and a picture of the patron.

Check In Functionality

The system must:

_____Include the ability to enter the barcode of an item to be checked in using a scanner or keyboard.

_____Include the ability to search for an item by asset name and then select the appropriate item to be checked in.

_____Display selected item check out information including asset name, item barcode, check out date, due date, patron name, patron type and patron barcode.

_____Include the ability to link to asset status or patron status to quickly access all asset and patron status functionality.

_____Include the ability to check in items previously identified as "lost" or "stolen" and display a system prompt indicating item's previous status.

Asset Status Functionality

The system must:

_____Make the following information available in the asset status module: asset name, barcode, date acquired, condition, district identification number, purchase order number, serial number, purchase price, home location, custodian, department, projected life, funding source, status and due date.

_____Make the following check out information available if checked out by patron: due date, name of patron to whom the item is currently checked out, patron type, patron barcode number, grade level, homeroom, five user-defined fields for that patron and "checked out by" information.

_____Make the following check out information available if checked out by department: due date, name of department to whom the item is currently checked out and "checked out by" information.

_____Make the following check out information available if checked out by location: due date, name of location to whom the item is currently checked out, location barcode number and "checked out by" information.

_____Make the following prior checkout information available: date item was returned, name of patron, department or location who last had item checked out, patron type, patron or location barcode number, grade level, homeroom, five user-defined locations for that patron and "checked in by" information.

_____Make the following information available in the asset status module: circulation statistics for the current month, current year, previous year and total.

_____Include the ability to change the status of an item to "lost" or "stolen" – independent of whether or not the item is currently checked out and independent of any inventory process. If the item is checked out, the system must track the last patron who had the item or the last assigned department or location.

_____Include the ability to edit the item, view its history, assign software and print barcode labels.

_____Include the ability to add an item-specific circulation note that can be displayed whenever the item is selected for circulation.

Patron Status Functionality
The system must:

_____Make the following information available in the patron status module: patron name (first, middle, last or nickname), patron type, patron barcode, status, gender, card expiration date, graduation year, birthdate, district identification number, grade level, homeroom, five user-defined fields for that patron and whether an acceptable use policy is on file or not.

_____Make the following information available for items checked out: due date, asset name, home location and date checked out. Additionally, include a statistical summary of current transactions, contact information and notes.

_____Include the ability to edit the patron, view their history, add a patron-specific note that can be displayed whenever the patron is selected and print the patron status or barcode label.

Reports

This section outlines reporting requirements that are in addition to those printing and list requirements outlined in other functional sections. Note that the application must allow

printing of information displayed in the interface from any function within the system (without copy/paste operations). Many lists displayed within the searching, cataloging and circulation functions must be printed to serve reporting needs. The additional reporting outlined in this section is used primarily to monitor and promote asset usage and to communicate with users regarding outstanding transactions.

The system must:

_____Provide district wide reporting and school-level reporting.

_____Include the ability to preview and print selected reports.

_____Include the ability to save reports to a file and access previously run reports at a later date.

_____Facilitate the creation of state, county, federal and other reports needed for compliance with GASB requirements.

_____Generate reports to help ensure assets are equally and fairly distributed in the district.

_____Allow users to produce other custom reports using leading report writer applications and applications that support ODBC access to SQL Server 2005 databases.

_____Generate summary and detailed reports.

_____Provide reports in PDF format or include the ability to download the report data in an XML file to be imported into another application such as Excel.

Asset Need Forecasting

_____Provides a report of items that may require replacement based on their acquisition date and projected life.

_____Tracks damaged or lost assets that need replacement.

_____Includes the ability to limit assets included in the report by asset type, status and purchase price.

_____Provides a summary report or a report with details for each item including asset name, barcode number, department, replacement date, purchase price and replacement price.

Asset Value

_____Provides a report that displays the value of items in a district, a specific site type or an individual site.

_____Provides the current collection value of assets or displays the depreciated collection value of items for a specified fiscal year.

_____Includes the ability to limit by asset type, status, purchase price and funding source.

_____Includes group-by options to provide information in the way that it is most significant for specific reporting needs.

Deleted Assets

_____Provides a report of items that have been deleted from the collection.

_____Includes the ability to limit assets included in the report to those assets deleted during a certain time frame, to assets of certain types, or both.

_____Provides a summary report that includes the following information: asset name, barcode, status, condition, date item was acquired, purchase price, district identification number, purchase order number, department, custodian, home location and date the item was deleted. The report should include a total number of items in the report and their asset types.

_____Provides a detailed report that includes all of the information in the summary report as well as the transaction history. The history should include every transaction involving, movement of, and change to, an asset.   For each transaction, the report should include the action, date and user who performed the action.

Item Barcode Labels

_____Includes the ability to print item barcodes either individually or by the sheet.

_____Includes the ability to print barcode labels based on the acquisition date of the items, a department, or for sites, a home location.

_____Includes the ability to print used barcode labels that contain the item's scannable barcode, the eye-readable number, and any of the three optional fields including the site or district name, asset name and home location.

_____Includes the ability to print unused barcode labels that contain the item's scannable barcode, the eye-readable number, and, if selected, the site name.

_____Include formatting options for multiple barcode label stocks.

Item Status

_____Provides a report about the status of items in the collection.

_____Includes the ability to limit by home location, custodian, department, asset type, price, status and funding source.

_____Provides the option to produce a summary including asset name, barcode, department, status, home location, condition, custodian and check out information.

_____Provides the option to produce a detailed report including all information in the summary as well as date acquired, district identification number, funding source,

purchase order, purchase price, serial number and any other fields that were defined for each asset type.

In Progress and Completed Inventories

_____Generates flexible inventory reports for accounting and insurance purposes.

_____Includes summary view of inventories and generates reports listing the items in the inventories.

_____Provides reports based on inventories including:

     _____In-progress inventory report generated at a site

     _____Completed inventory report generated at a site

     _____In-progress inventory report generated at the district

     _____District detail report generated at the district

_____Includes for each inventory and for each home location, the total numbers of items counted and uncounted.

_____Includes, for each item, the following information: asset name, purchase price, item barcode number, home location, item status and custodian.

Print Location Barcodes

_____Provides the ability to print location barcodes as labels or a list.

_____Includes location's name, scannable barcode and eye-readable number.

Software Reports: Software by Item

_____Provides lists of assets that have software assigned to them.

_____Includes ability to select assets by asset type or barcode.

Software Reports: Software by License

_____Provides the numbers of transferable and non-transferable licenses owned, assigned, and available. It can also include information about the hardware to which it is assigned.

_____Provides the ability to track licenses, analyze their use, and determine their location.

Checked Out/Overdue Materials & Unpaid Fines

_____Provide the ability to report on materials checked out or overdue including the following options:

_____Only checkout currently overdue

_____Only checkouts overdue within a range of number of days

_____Only checkouts due within a specific date range

_____Includes the ability to print report or notice formats.

_____Includes the ability to limit by patron type and patron status.

_____Includes the ability to select range and sort options including patron name, grade level, homeroom and five user-defined fields.

_____Provide options to include, or not, the item price, patron barcode, patron phone number, at least two user defined fields and ability to start a new page for each group.

_____Includes the ability to distribute notices internally or externally, page layout options, custom notice text and support of double window envelopes (#10) that include patrons address and sites return address.

_____Includes the ability to email notices.

_____Includes the ability to save the report setup, to schedule reports to be run on a specified day at a specified time or to be run on a weekly basis, or to select the report and run it on demand.

_____Includes the ability to edit or delete saved reports and, when included, the run schedule.

Patron Barcode Labels

_____Provide ability to print both used and unused patron barcodes.

_____Include the ability to sort by patron name, grade level, homeroom and user-defined patron fields.

_____Include the ability to limit by patron type and patron status.

_____Include formatting options for multiple barcode label stocks.

_____Include the ability to print a range of unused patron barcodes that can fill in gaps in the assigned barcode range.

Patron ID Cards

_____Provide ability to print patron ID cards.

_____Include the ability to sort by patron name, grade level, homeroom and user-defined patron fields.

_____Include the ability to limit by patron type, patron status, graduation year or card expiration date.

_____Provide ability to include patron picture, barcode for scanning and up to three additional fields from the following: card expiration date, district identification number, grade level, homeroom, graduation year or any of five user-defined fields.

_____Include formatting options for multiple patron card stocks.

Patron Name List

_____Include ability to create customized lists of selected patrons.

_____Include ability to limit by name, grade level, homeroom, five user-defined fields, whether an acceptable use policy is on file or not, or to a specific barcode list.

_____Include the ability to limit by patron type, patron status, graduation year or card expiration date.

Inventory

The system must:

_____Allow each site to conduct an inventory of its assets and generate inventory reports.

_____Allow the district to initiate a district-wide inventory, monitor its progress, and generate district-wide inventory reports.

_____Allow for full or partial inventories by home location, custodian or department. A partial inventory could be limited by home location, custodian, department, asset type or purchase price.

_____Allow for multiple inventories at one time.

_____Support an asset inventory without impacting the ability to circulate items.

_____Automatically identify items in circulation (existing checkouts) as accounted for during an inventory.

_____Process barcode scans for inventory by the following methods:

　　　_____Scanning or typing barcodes directly into the inventory interface

　　　_____From a text file containing a list of barcodes

　　　_____From a wireless hand-held device used to scan barcodes remotely

_____Automatically checkin items (existing checkouts), using normal checkin processing, when they are scanned during an inventory.

_____Indicate number of items inventoried as well as number remaining uncounted.

_____Include the ability to produce a listing of all items not accounted for during the inventory.

_____Allow the user to review the displayed list of unaccounted for items and to indicate, directly in the system from the list, that the item has been found, or the item should be marked as lost.

_____Include the ability to set all uncounted items to a status of lost. The system must also indicate the date the item was lost.

_____Include the ability to produce a listing of all items marked as lost during the inventory.

_____Allow the user to review the displayed list of items marked as lost and to indicate, directly in the system from the list, that the item has been found (can be accounted for), or the item should be deleted.

_____Include the ability to reset all items marked as lost (by an inventory) on a specific date to unaccounted for.

_____Provide the ability to restart the inventory process.

Additional Utilities

The system must:

_____Include the ability to schedule automatically back ups of the system using an industry-standard backup procedure.

_____Include the ability to restore the backup made by using the industry-standard backup procedure.

_____Include the ability to import patron data and student class schedules in an XML format, which can be used to add/update patrons from another system such as a student information system.

Integration with Library, Textbook, Media, and Asset Automation Software

The system must:

_____Provide complete library, textbook, media, and asset management integration, which includes sharing of patron data, ability to switch between library, textbook, media, and asset functions seamlessly and combined reporting capabilities.

_____Include the ability to display and report patron checkouts and fines for library and textbook transactions, just library transactions or just textbook transactions.

_____Include the ability for patrons to view library, textbook, media, and asset checkouts, fines and renewals.

_____Ability to configure access levels (security rights) for library, textbook, media management, and asset management functionality in order to provide or restrict user access.

_____Includes the ability to create a textbook only user account.

_____Includes the ability to create a library and textbook only user account.

_____Includes the ability to create a library, textbook, and media only user account.

_____Includes the ability to create a library, textbook, media, and asset user account.

_____Includes the ability for the staff to choose to view only the menu selections that are applicable to the features used.

References

List installed sites with a similar configuration.

Vendor Experience

Describe vendor history.

List the vendor's commitment and experience in automating libraries.

Cost Proposal

Price of proposed solution.

Maintenance pricing for year 2

List price for on-going training/workshops